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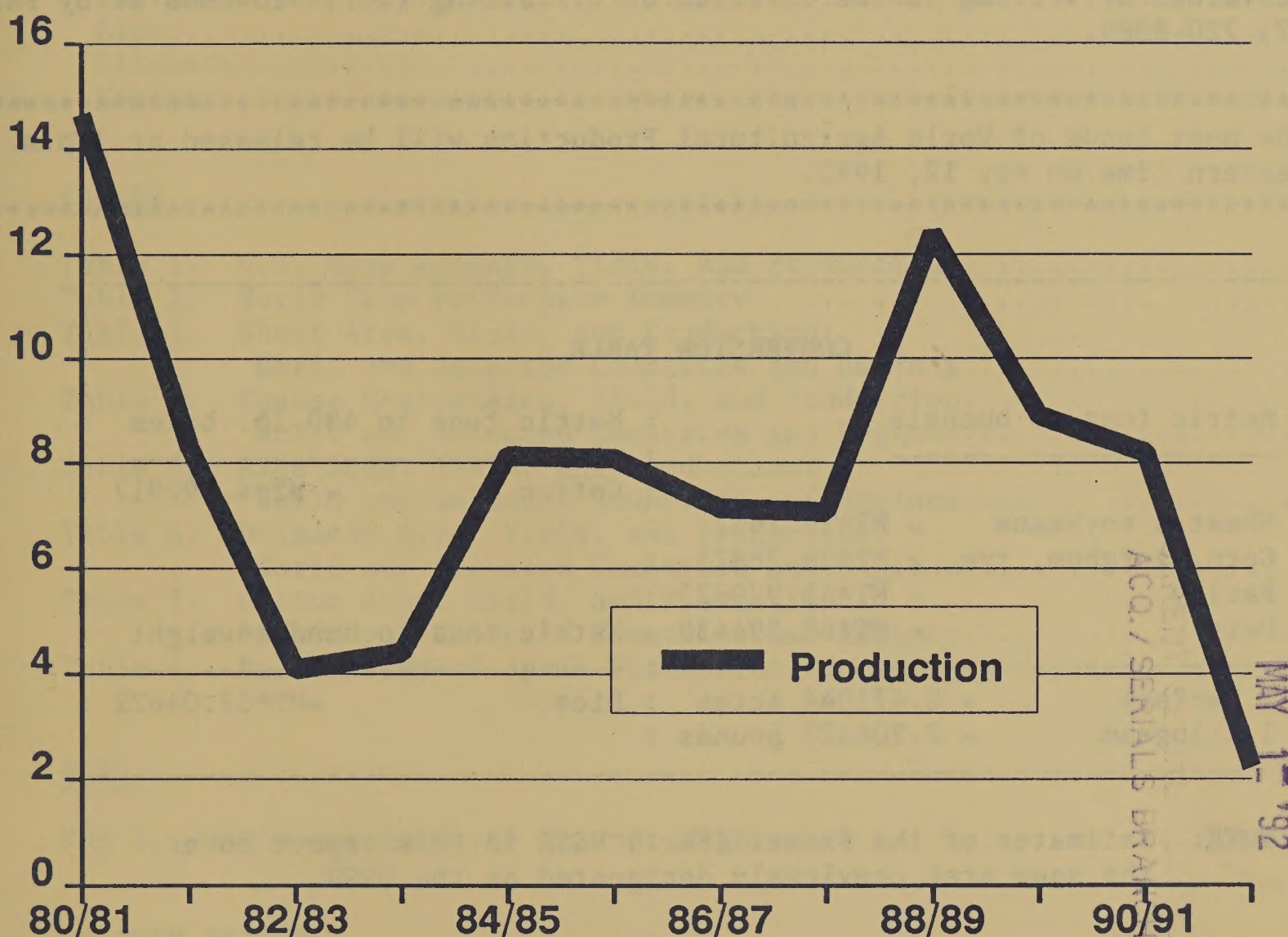
Foreign
Agricultural
Service

Circular Series
WAP 4-92
April 1992

World Agricultural Production

South African Corn

Million Metric Tons



Production Articles This Month...

South African Trip Report

1992 Winter Grain Conditions

Indonesia, Thailand Grains

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-264), April 10, 1992.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * Eastern time on May 12, 1992. *

:		:	
:	CONVERSION TABLE		:
:		:	
:	Metric tons to bushels		:
:	-----		:
:		:	
:	Wheat & soybeans	= MT*36.7437	:
:	Corn, sorghum, rye	= MT*39.36825	:
:	Barley	= MT*45.929625	:
:	Oats	= MT*68.894438	:
:	-----		:
:	1 hectare	= 2.471044 acres	:
:	1 kilogram	= 2.204622 pounds	:

NOTE: Estimates of the Former (Fmr.) USSR in this report cover the same area previously designated as the USSR.

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PRODUCTION HIGHLIGHTS FOR 1991/92

April 1992

WHEAT: World production for 1991/92 is estimated at 546.9 million tons, down 0.1 million or marginally below last month's estimate and down 8 percent from a year earlier. Total foreign production is estimated at 493.0 million tons, down 0.1 million or less than 1 percent from last month and down 5 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 53.9 million tons, unchanged from last month, but down 28 percent from last year.
- o Afghanistan Production is estimated at 1.7 million tons, down 0.9 million or 34 percent from last month, but unchanged from 1990/91. Crop area has declined 40 percent since the mid-1980's.
- o EC-12 Production is estimated at 90.1 million tons, down 0.4 million or less than 1 percent from last month, but up 6 percent from a year earlier. Declines in area and yields in France and the Netherlands more than offset a slight increase in estimated output by Denmark.
- o Egypt Production is estimated at a record 4.5 million tons, down 0.3 million or 7 percent from last month, but up 5 percent from 1990/91. Lower-than-anticipated yield resulted in decreased estimated output.
- o Brazil Production is estimated at 3.0 million tons, down 0.2 million or 6 percent from last month and down 3 percent from a year earlier. Estimated area fell to the lowest level in 8 years.
- o Iran Production is estimated at 8.9 million tons, up 1.8 million or 25 percent from last month and up 9 percent from the revised estimate for 1990/91. Iran is estimated to have produced a second consecutive record harvest, with increases in both yield and area.

COARSE GRAINS: World production for 1991/92 is estimated at 801.4 million tons, down 2.0 million or marginally below last month's estimate and down 4 percent from 1990/91. Total foreign production is estimated at 582.9 million tons, down 2.0 million or less than 1 percent from last month and down 3 percent from a year earlier. Country highlights are as follows:

- o United States Production is estimated at 218.5 million tons, unchanged from last month, but down 5 percent from 1990/91.
- o South Africa Production is estimated at 2.6 million tons, down 2.4 million or 48 percent from last month and down 71 percent from last year. The severe drought has cut production prospects for both corn and sorghum. Recent USDA field travel through the major corn-producing areas of the Transvaal and Orange Free State confirmed this season's drought impact on corn yield.
- o Malawi Production is estimated at 0.8 million tons, down 0.7 million or 47 percent from last month and down 40 percent from 1990/91. The corn crop is the smallest in 20 years due to severe drought in southern and central production areas.
- o Zimbabwe Production is estimated at 0.7 million tons, down 0.5 million or 42 percent from last month and down 61 percent from last year. Estimated area and yield for corn and sorghum were reduced due to the severe drought.
- o Eastern Europe Production is estimated at 60.8 million tons, down 0.6 million or 1 percent from last month, but up 16 percent from 1990/91. Lower corn yield in Yugoslavia is the primary reason for the decline.
- o Egypt Production is estimated at 5.2 million tons, down 0.3 million or 6 percent from last month and down 4 percent from a year earlier. The decrease is due to lower estimated corn area.
- o Afghanistan Production is estimated at 0.9 million tons, down 0.2 million or 18 percent from last month, but unchanged from a year earlier. Estimated barley and corn area and yields are forecast significantly lower.
- o Pakistan Production is estimated at 1.6 million tons, down 0.2 million or 12 percent from last month and down 10 percent from 1990/91. Dry weather reduced estimated corn, millet, and sorghum area and yields.
- o Brazil Production is estimated at 29.3 million tons, up 1.1 million or 4 percent from last month and up 20 percent from 1990/91. Larger corn and sorghum production more than offset declines in estimated barley and oats output.

- o Argentina Production is estimated at 13.1 million tons, up 0.5 million or 4 percent from last month and up 18 percent from last year. Corn production increased as a result of better-than-average yields in the main growing regions of northern Buenos Aires and Cordoba.
- o Niger Production is estimated at 2.3 million tons, up 0.5 million or 30 percent from last month and up 45 percent from a year earlier. The increase reflects above average millet area and yield. Estimated sorghum production also increased.
- o Mali Production is estimated at 2.0 million tons, up 0.4 million or 23 percent from last month and up 23 percent from 1990/91. The increase is due to higher corn and millet estimated area and yields.
- o Iran Production is estimated at 2.9 million tons, up 0.2 million or 7 percent from last month and up 4 percent from a year earlier. Estimated barley area and yield were higher than expected.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 348.2 million tons, up 1.6 million or slightly above last month's estimate, but down 1 percent from the 1990/91 record crop. Total foreign production is projected at 343.1 million tons, up 1.5 million or slightly above last month's estimate, but down 1 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 5.0 million tons, up 0.1 million or 3 percent from last month, but down 1 percent from a year earlier. A higher estimated milling rate was responsible for the change from last month.
- o Brazil Production is estimated at 7.3 million tons, up 0.5 million or 8 percent from last month and up 14 percent from 1990/91. Improved yield due to favorable weather more than offset a reduction in area.
- o Thailand Production is estimated at 13.5 million tons, up 0.3 million or 3 percent from last month and up 19 percent from last year. A larger-than-anticipated main season harvest improved production prospects.
- o Egypt Production is estimated at 2.3 million tons, up 0.2 million or 10 percent from last month and up 9 percent from 1990/91. The increase is due to higher-than-expected yield and increased estimated area.

o Guinea

Production is estimated at 0.6 million tons, up 0.2 million or 63 percent from last month and up 63 percent from 1990/91. The increase is due to higher estimated area harvested and above average yield.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 224.1 million tons, down 0.9 million or less than 1 percent from last month, but up 3 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 159.9 million tons, down 0.9 million or 1 percent from last month, but up 2 percent from last year. Total oilseed production in the United States is forecast at 64.3 million tons, virtually unchanged from last month, but up 6 percent from last year.

* **Soybeans:** World production for 1991/92 is estimated at 105.4 million tons, down 0.3 million or less than 1 percent from last month, but up 1 percent from last year. Total foreign soybean output is estimated at 51.3 million tons, down 0.3 million or less than 1 percent from last month, but up slightly from 1990/91. Country highlights are as follows:

o United States

Production is estimated at 54.0 million tons, unchanged from last month, but up 3 percent from last year. The National Agricultural Statistics Service, USDA, estimates yield at 2.30 tons per hectare from a harvested area of 23.5 million hectares.

o Argentina

Production is estimated at 10.3 million tons, down 0.2 million or 2 percent from last month and down 10 percent from last year. Lower yield potential resulted from late planting and dry conditions during pod fill.

* **Cottonseed:** World production for 1991/92 is forecast at 36.6 million tons, up 0.1 million or less than 1 percent from last month and up 9 percent from last year. Total foreign production is forecast at 30.5 million tons, up 0.1 million or less than 1 percent from last month and up 8 percent from last year. Country highlights are as follows:

o United States

Production is estimated at 6.1 million tons, unchanged from last month, but up 13 percent from 1990/91. Official estimates by the National Agricultural Statistics Service peg expected yield at 1.18 tons per hectare and harvested area at 5.2 million hectares.

o Pakistan

Production is estimated at a record 4.4 million tons, up 0.1 million or 3 percent from last month and up 33 percent from last year. A record cotton yield is forecast owing to an extended, dry harvest period and expansion of area planted to high-yield varieties.

- o Turkey Production is forecast at 0.9 million tons, up 0.1 million or 13 percent from last month and up 6 percent from 1990/91. The increase in production is due to higher yield from the cotton crop harvested last November.
- * Peanuts: World production for 1991/92 is forecast at 22.7 million tons, down 0.1 million or less than 1 percent from last month, but up 2 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, down 0.1 million or less than 1 percent from last month and down 1 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at a record 2.2 million tons, virtually unchanged from last month, but up 37 percent percent from 1990/91. The National Agricultural Statistics Service estimates yield at 2.74 tons per hectare from a record harvested area of 0.8 million hectares.
- * Sunflowerseed: World production for 1991/92 is estimated at 20.8 million tons, down 0.8 million or 4 percent from last month and down 8 percent from 1990/91. Total foreign production is estimated at 19.1 million tons, down 0.8 million or 4 percent from last month and down 11 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at 1.6 million tons, unchanged from last month, but up 48 percent from last year. NASS estimates yield at 1.51 tons per hectare from a harvested area of 1.1 million hectares.
 - o Argentina Production is estimated at 3.5 million tons, down 0.4 million or 10 percent from last month and down 10 percent from last year. Lower yield potential resulted from heavy rains at flowering which diminished pollination and seed set. Early yields are below expectations.
 - o South Africa Production is estimated at 0.2 million tons, down 0.4 million or 64 percent from last month and down 70 percent from last year. A severe drought led to a reduction in estimated area and yield.
- * Rapeseed: World production for 1991/92 is estimated at a record 28.6 million tons, up 0.1 million or less than 1 percent from last month and up 14 percent from last year. Total foreign production is estimated at 28.5 million tons, up 0.1 million or less than 1 percent from last month and up 14 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at 83,000 tons, unchanged from last month, but up 53 percent from last year. NASS estimates average yield at 1.43 tons per hectare from a harvested area of 58,000 hectares.

o China

Production is estimated at a record 7.4 million tons, up 0.1 million or 2 percent from last month and up 7 percent from last year. The adjustment is based on a preliminary official estimate by the State Statistical Bureau.

* Flaxseed: World production for 1991/92 is estimated at 2.1 million tons, unchanged from last month, but down 8 percent from last year. Production in the United States for 1991/92 is unchanged this month at an estimated 155,000 tons, up 60 percent from last year. Total foreign production is pegged at 1.9 million tons, unchanged from last month, but down 11 percent from 1990/91. There were no significant country changes this month.

* Copra: World production for 1991/92 is forecast at 4.6 million tons, unchanged from last month, but down 3 percent from last year. There were no significant country changes this month.

* Palm Kernels: World production for 1991/92 is forecast at a record 3.5 million tons, down 3,000 tons or less than 1 percent from last month, but up 5 percent from last year. There were no significant country changes this month.

* Palm Oil: World production for 1991/92 is forecast at a record 11.7 million tons, down 24,000 tons or less than 1 percent from last month, but up 4 percent from last year. There were no significant country changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 95.4 million bales. This estimate is down 0.1 million bales or less than 1 percent from last month, but up 10 percent from 1990/91. Total foreign production is projected at a record 77.8 million bales, down 0.1 million or less than 1 percent from last month, but is an increase of 9 percent over 1990/91. Country highlights are as follows:

o United States

Production is estimated at 17.5 million bales, unchanged from last month, but up 13 percent from last year.

o Brazil

Production is estimated at 3.6 million bales, down 0.2 million or 5 percent from last month, but up 11 percent from last year. Production improved over last year's drought-reduced level; however, an area lower than initially estimated, coupled with a prolonged dry period, have reduced potential for the 1991/92 Center-South crop.

o Zimbabwe

Production is estimated at 0.1 million bales, down 0.2 million or 52 percent from last month and down 60 percent from last year. Area and yield estimates were lowered due to widespread drought.

o Pakistan

Production is estimated at a record 10.0 million bales, up 0.3 million or 3 percent from last month and up 33 percent from last year. An increase in area plus a record crop yield have boosted estimated production. The record yield is estimated owing to an unusually long and dry harvest period and increased use of high yielding varieties. Record yields are estimated for cotton in both Sind and Punjab provinces.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA		HARVESTED AREA		YIELD			PRODUCTION		
	Prel.	Proj.	Prel.	Proj.	Prel.	1991/92 Proj.		Prel.	1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	Mar.	Apr.
All Wheat Winter Other Rye	--Million acres--			--Million acres--			--Bushels per acre--			--Million bushels--
	76.6	77.2	69.9	62.2	69.3	57.7	32.7	39.5	34.3	34.3
	55.1	56.9	51.0	41.5	49.9	39.4	35.0	40.7	34.8	34.8
	21.5	20.3	18.9	20.7	19.4	18.3	28.1	36.4	33.3	33.3
	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1	24.6	24.6
Soybeans	60.8	57.8	59.8	59.5	56.5	58.0	32.3	34.1	34.3	34.3
Corn Sorghum Barley Oats	72.2	74.2	76.0	64.7	67.0	68.8	116.3	118.5	108.9	108.6
	12.6	10.5	11.0	11.1	9.1	9.8	55.4	63.1	59.0	59.0
	9.1	8.2	8.9	8.3	7.5	8.4	48.6	56.1	55.2	55.2
	12.1	10.4	8.7	6.9	5.9	4.8	54.3	60.1	50.6	50.6
Rice							--Pounds per acre--			--Million CWT--
	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,529	5,617	5,617
All Cotton										--Million 480-pound bales--
	10.6	12.3	14.1	9.5	11.7	12.8	614	634	656	656

1/ All estimates are from the USDA, National Agricultural Statistics Service (NASS) and are published in the Crop Production circular available from NASS.

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			Fmr. USSR 3/	Asia				South America		Selected Other			All Other Countries	
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki-istan	Thai-land	Argen-tina	Brazil	Aus-tralia	South Africa		Turkey
—Million metric tons—																				
<u>Wheat</u> 1989/90 1990/91 prel. 1991/92 proj. March April	537.9	482.4	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
	594.1	519.7	74.5	32.7	3.9	84.6	5.1	41.1	108.0	98.2	49.9	0.0	14.4	0.0	10.5	3.1	15.1	1.7	15.5	16.8
	547.0	493.0	53.9	32.8	3.7	90.4	4.1	39.2	78.0	96.0	54.5	0.0	14.5	0.0	9.0	3.2	10.0	2.2	16.0	18.1
	546.9	493.0	53.9	32.8	3.7	90.1	4.1	39.0	78.0	96.0	54.5	0.0	14.6	0.0	9.0	3.0	10.0	2.2	16.0	17.2
<u>Coarse Grains</u> 1989/90 1990/91 prel. 1991/92 proj. March April	802.9	581.6	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.9	9.5	7.5	81.9
	832.9	602.2	230.7	25.4	18.4	84.2	13.7	52.3	113.3	113.5	32.9	5.2	2.8	4.1	11.0	24.4	6.7	8.9	9.3	76.2
	803.4	584.9	218.5	22.7	17.2	88.6	12.1	61.4	85.5	110.3	31.5	5.2	2.5	3.9	12.6	28.2	6.9	4.9	9.7	81.7
	801.4	582.9	218.5	22.7	17.2	88.7	12.3	60.8	85.5	110.3	31.5	5.3	2.4	3.8	13.1	29.3	6.9	2.6	9.6	81.1
<u>Rice (Milled)</u> 1989/90 1990/91 prel. 1991/92 proj. March April	344.3	339.2	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	73.6	29.1	3.2	13.3	0.2	4.9	0.6	0.0	0.2	23.2
	352.0	346.9	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	74.6	29.4	3.3	11.3	0.2	6.5	0.5	0.0	0.2	24.3
	346.5	341.6	4.9	0.0	0.2	1.4	0.0	0.1	1.4	130.2	71.0	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.3
	348.2	343.1	5.0	0.0	0.2	1.4	0.0	0.1	1.4	130.2	71.0	28.7	3.2	13.5	0.2	7.3	0.7	0.0	0.1	24.0
<u>Total Grains 1/</u> 1989/90 1990/91 prel. 1991/92 proj. March April	1,685.1	1,403.3	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.2	34.1	20.4	17.6	18.7	33.0	21.7	11.6	20.2	197.2
	1,779.1	1,468.7	310.3	58.1	22.5	170.4	18.7	93.5	222.9	344.2	157.3	34.6	20.5	15.4	21.8	33.9	22.2	10.6	25.0	197.2
	1,696.9	1,419.6	277.3	55.5	21.1	180.5	16.2	100.7	164.9	336.5	157.0	33.9	20.2	17.1	21.8	38.2	17.7	7.2	25.9	205.3
	1,696.4	1,419.0	277.4	55.5	21.1	180.2	16.4	99.9	164.9	336.5	157.1	34.0	20.1	17.3	22.3	39.6	17.6	4.8	25.7	206.0
<u>Oilseeds 2/</u> 1989/90 1990/91 prel. 1991/92 proj. March April	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.4	2.2	3.3	0.9	15.8	21.6	0.7	1.0	2.3	21.5
	217.8	157.1	60.7	5.6	1.0	13.1	0.7	4.3	13.0	33.3	20.3	2.2	3.7	0.8	16.8	17.1	1.9	0.9	2.0	20.4
	225.1	160.8	64.3	6.5	1.1	13.7	0.6	4.1	11.7	33.8	21.0	2.2	4.6	0.7	15.6	20.1	1.0	0.8	1.6	21.5
	224.1	159.9	64.3	6.5	1.1	13.7	0.7	4.1	11.7	34.0	21.0	2.2	4.7	0.7	15.0	20.1	1.0	0.4	1.7	21.2
<u>Cotton</u> 1989/90 1990/91 prel. 1991/92 proj. March April	—Million 480-pound bales—																			
	79.9	67.7	12.2	0.0	0.8	1.5	0.0	0.1	12.2	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
	87.0	71.5	15.5	0.0	0.8	1.3	0.0	0.1	11.9	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	0.3	3.0	10.0
	95.5	77.9	17.5	0.0	0.8	1.3	0.0	0.1	11.3	26.0	9.1	0.0	9.7	0.2	1.2	3.8	1.7	0.2	2.6	10.0
	95.4	77.8	17.5	0.0	0.8	1.3	0.0	0.1	11.3	26.0	9.1	0.0	10.0	0.2	1.2	3.6	1.7	0.2	2.6	9.8

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains, and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 175.0 million projected for 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

3/ Fmr. USSR covers the same area previously designated USSR.

Note: Entries of 0.0 indicate no reported or insignificant production.

April 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Mar.	Proj. Apr.	Prel. 1989/90	1991/92 1990/91	Proj. Mar.	Proj. Apr.
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	226.4	231.7	222.7	2.38	2.56	2.45	2.46	537.9	594.1	547.0	546.9
United States	25.2	28.0	23.3	2.20	2.66	2.31	2.31	55.4	74.5	53.9	53.9
Total Foreign	201.3	203.7	199.3	2.40	2.55	2.47	2.47	482.4	519.7	493.0	493.0
Maj. Foreign Exporters	45.1	45.8	43.9	2.91	3.12	3.23	3.23	131.0	142.9	142.3	141.9
Argentina	5.5	5.7	4.5	1.86	1.84	2.00	2.00	10.2	10.5	9.0	9.0
Australia	9.0	9.2	7.8	1.58	1.63	1.28	1.28	14.2	15.1	10.0	10.0
Canada	13.6	14.4	14.5	1.80	2.27	2.26	2.26	24.6	32.7	32.8	32.8
EC-12	17.0	16.5	17.1	4.83	5.14	5.26	5.26	82.0	84.6	90.4	90.1
Major Importers	96.6	98.4	95.4	2.48	2.65	2.41	2.41	239.1	261.3	230.5	229.9
Brazil	3.4	3.3	2.1	1.65	0.94	1.33	1.43	5.6	3.1	3.2	3.0
China	29.8	30.8	30.8	3.04	3.19	3.12	3.12	90.8	98.2	96.0	96.0
Eastern Europe	9.8	9.7	9.9	4.14	4.22	3.93	3.93	40.7	41.1	39.2	39.0
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	5.90	3.2	4.3	4.8	4.5
Other N. Africa 1/	4.9	5.4	5.5	1.14	1.04	1.56	1.56	5.6	5.7	8.6	8.6
Japan	0.3	0.3	0.2	3.47	3.66	3.18	3.18	1.0	1.0	0.8	0.8
Fmr. USSR 2/	47.7	48.2	46.0	1.94	2.24	1.70	1.70	92.3	108.0	78.0	78.0
Other Foreign	59.7	59.5	60.0	1.88	1.94	2.01	2.02	112.3	115.5	120.2	121.2
India	24.1	23.5	24.0	2.24	2.12	2.27	2.27	54.1	49.9	54.5	54.5
Iran	6.8	6.5	6.8	0.81	1.26	1.15	1.31	5.5	8.2	7.1	8.9
Mexico	1.0	1.0	0.9	4.21	4.11	4.20	4.20	4.0	3.9	3.7	3.7
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.22	5.18	4.4	5.1	4.1	4.1
Pakistan	7.7	7.8	7.9	1.87	1.84	1.82	1.84	14.4	14.4	14.5	14.6
South Africa	1.8	1.6	1.4	1.11	1.10	1.58	1.58	2.0	1.7	2.2	2.2
Turkey	8.7	8.8	8.8	1.44	1.77	1.80	1.82	12.5	15.5	16.0	16.0
Others	8.7	9.4	9.4	1.77	1.78	1.84	1.82	15.4	16.8	18.1	17.2

1/ Algeria, Libya, Morocco, and Tunisia.

2/ Fmr. USSR covers the same area previously designated USSR.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. Mar.	Apr.	Prel. 1989/90	1990/91	1991/92 Proj. Mar.	Apr.
<i>TOTAL COARSE GRAINS</i>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World 1/	322.9	315.8	323.8	2.49	2.64	2.48	2.48	802.9	832.9	803.4	801.4
United States	37.0	36.4	37.3	5.98	6.34	5.85	5.85	221.4	230.7	218.5	218.5
Total Foreign	285.8	279.5	286.4	2.03	2.15	2.04	2.04	581.6	602.2	584.9	582.9
Maj. Foreign Exporters	21.0	20.2	21.1	2.50	2.77	2.41	2.32	52.5	56.1	50.9	49.0
Argentina	3.2	3.3	3.9	2.64	3.37	3.26	3.39	8.3	11.0	12.6	13.1
Australia	3.9	4.1	4.9	1.77	1.64	1.40	1.40	6.9	6.7	6.9	6.9
Canada	8.3	7.6	6.9	2.84	3.32	3.29	3.29	23.5	25.4	22.7	22.7
South Africa	4.1	3.7	3.9	2.31	2.40	1.25	0.65	9.5	8.9	4.9	2.6
Thailand	1.6	1.5	1.5	2.78	2.64	2.60	2.54	4.3	4.1	3.9	3.8
Major Importers	103.8	99.9	101.7	2.73	2.84	2.62	2.61	282.9	283.3	266.3	265.7
Eastern Europe	16.5	15.9	16.4	3.66	3.28	3.73	3.70	60.2	52.3	61.4	60.8
EC-12	20.3	19.3	19.0	4.43	4.36	4.65	4.66	89.8	84.2	88.6	88.7
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.24	4.29	12.4	13.7	12.1	12.3
Mexico	7.5	8.2	8.8	1.88	2.23	1.95	1.95	14.1	18.4	17.2	17.2
Fmr. USSR 2/	56.0	52.9	54.2	1.87	2.14	1.58	1.58	104.8	113.3	85.5	85.5
Other Major Import. 3/	0.4	0.4	0.4	3.83	3.71	3.63	3.56	1.6	1.5	1.4	1.3
Other Foreign	161.0	159.4	163.7	1.53	1.65	1.63	1.64	246.1	262.8	267.7	268.2
Brazil	12.5	13.4	14.1	1.79	1.82	2.02	2.08	22.5	24.4	28.2	29.3
China	28.2	29.1	29.0	3.31	3.90	3.80	3.80	93.5	113.4	110.3	110.3
India	37.7	36.6	36.7	0.92	0.90	0.86	0.86	34.6	32.9	31.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.83	5.0	5.2	5.2	5.3
Nigeria	9.9	9.5	9.8	0.82	0.67	0.83	0.83	8.1	6.3	8.2	8.2
Philippines	3.6	3.9	3.6	1.22	1.32	1.28	1.28	4.4	5.1	4.6	4.6
Turkey	4.4	4.4	4.4	1.70	2.10	2.17	2.17	7.5	9.3	9.7	9.6
Others	61.9	59.7	63.1	1.14	1.11	1.11	1.10	70.5	66.2	70.0	69.4
<i>BARLEY</i>											
World	74.9	73.9	77.9	2.27	2.53	2.19	2.19	170.1	186.8	170.6	170.7
United States	3.4	3.0	3.4	2.62	3.02	2.97	2.97	8.8	9.2	10.1	10.1
Total Foreign	71.5	70.9	74.5	2.26	2.51	2.15	2.16	161.3	177.6	160.4	160.6
Australia	2.3	2.5	2.8	1.75	1.62	1.43	1.43	4.0	4.1	4.0	4.0
Canada	4.7	4.7	4.5	2.50	2.96	2.78	2.78	11.7	13.9	12.5	12.5
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.74	3.74	14.5	14.3	14.3	14.3
EC-12	12.6	12.3	12.0	4.05	4.12	4.21	4.23	51.0	50.8	50.8	50.8
Other W. Europe	1.5	1.5	1.5	3.87	4.37	3.99	4.05	5.9	6.4	6.1	6.2
Turkey	3.4	3.4	3.4	1.46	1.94	2.00	2.00	4.9	6.6	6.8	6.8
Fmr. USSR 2/	27.6	26.1	28.5	1.75	2.34	1.51	1.51	48.5	61.0	43.0	43.0
Others	12.6	13.5	14.7	1.20	1.10	1.18	1.18	15.1	14.8	17.3	17.3

FOOTNOTES AT END OF TABLE.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	1991/92 Mar.	1991/92 Apr.	Prel. 1989/90	1991/92 1990/91	1991/92 Mar.	1991/92 Apr.
<u>CORN</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	126.5	127.0	131.2	3.66	3.77	3.65	3.64	462.7	478.6	480.6	477.5
United States	26.2	27.1	27.9	7.30	7.44	6.82	6.82	191.2	201.5	189.9	189.9
Total Foreign	100.3	99.9	103.4	2.71	2.77	2.80	2.78	271.6	277.0	290.8	287.6
Maj. Foreign Exporters	6.6	6.3	7.0	2.77	3.11	2.47	2.20	18.2	19.7	17.2	15.3
Argentina	1.7	2.0	2.4	3.06	3.90	3.75	3.96	5.2	7.6	9.0	9.5
South Africa	3.5	3.0	3.3	2.56	2.74	1.38	0.68	8.9	8.3	4.5	2.2
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.73	4.1	3.8	3.7	3.6
Major Importers	21.2	19.7	22.2	3.93	3.51	3.84	3.82	83.4	69.0	85.3	84.5
Eastern Europe	7.1	6.5	6.8	4.14	3.26	4.55	4.50	29.2	21.1	30.9	30.3
EC-12	3.9	3.4	3.9	6.91	6.29	6.85	6.81	26.9	21.7	26.5	26.5
Other W. Europe	0.2	0.2	0.2	7.83	7.98	8.34	8.34	1.8	1.8	1.8	1.8
Mexico	5.8	6.6	7.7	1.68	2.14	1.88	1.88	9.8	14.1	14.5	14.5
Fmr. USSR 2/	4.1	2.8	3.5	3.71	3.50	3.14	3.14	15.3	9.8	11.0	11.0
Other Maj. Import. 3/	0.1	0.1	0.1	4.28	4.47	4.16	3.86	0.5	0.5	0.5	0.4
Other Foreign	72.5	73.9	74.2	2.34	2.55	2.52	2.53	170.0	188.3	188.3	187.8
Brazil	12.1	12.9	13.6	1.80	1.84	2.04	2.10	21.8	23.7	27.5	28.5
Canada	1.0	1.0	1.1	6.36	6.91	6.75	6.75	6.4	7.2	7.3	7.3
China	20.4	21.4	21.5	3.88	4.52	4.41	4.41	78.9	96.8	95.0	95.0
Egypt	0.8	0.8	0.7	5.37	5.47	5.59	6.24	4.5	4.6	4.8	4.4
India	5.9	6.0	5.7	1.61	1.52	1.47	1.47	9.4	9.1	8.4	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.83	5.0	5.2	5.2	5.3
Philippines	3.6	3.9	3.6	1.22	1.32	1.28	1.28	4.4	5.1	4.6	4.6
Zimbabwe	1.1	1.1	0.9	1.93	1.44	0.87	0.59	2.2	1.6	1.0	0.5
Others	25.0	24.0	24.2	1.50	1.46	1.42	1.39	37.3	35.1	34.6	33.8
<u>SORGHUM</u>											
World	41.6	38.8	40.8	1.32	1.36	1.32	1.32	55.0	52.7	53.7	53.7
United States	4.5	3.7	4.0	3.48	3.96	3.70	3.70	15.6	14.6	14.7	14.7
Total Foreign	37.1	35.1	36.8	1.06	1.09	1.06	1.06	39.4	38.2	39.0	39.0
Argentina	0.7	0.7	0.8	2.86	3.57	3.21	3.21	2.0	2.5	2.5	2.5
Australia	0.4	0.4	0.6	2.49	2.22	1.72	1.72	0.9	0.9	1.1	1.1
China	1.6	1.5	1.4	2.72	3.67	3.50	3.50	4.4	5.7	4.9	4.9
India	14.9	14.5	15.0	0.86	0.82	0.80	0.80	12.9	11.9	12.0	12.0
Mexico	1.3	1.3	0.8	2.88	2.85	2.75	2.75	3.8	3.7	2.2	2.2
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.1	0.1	0.1	2.09	2.09	1.33	0.70	0.3	0.2	0.2	0.1
Sudan	4.0	3.0	4.2	0.45	0.50	0.69	0.69	1.8	1.5	2.9	2.9
Thailand	0.2	0.2	0.2	1.44	1.42	1.06	1.06	0.2	0.3	0.2	0.2
Others	9.4	9.0	9.3	1.01	0.97	1.02	1.03	9.6	8.7	9.5	9.6

FOOTNOTES AT END OF TABLE.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Mar.	Proj. Apr.	Prel. 1989/90	1991/92 1990/91	Proj. Mar.	Proj. Apr.
<u>OATS</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	22.6	21.3	20.4	1.84	1.98	1.68	1.69	41.4	42.1	34.3	34.4
United States	2.8	2.4	1.9	1.95	2.16	1.81	1.81	5.4	5.2	3.5	3.5
Total Foreign	19.8	18.9	18.4	1.82	1.96	1.67	1.68	36.0	36.9	30.8	30.9
Fmr. USSR 2/	10.8	10.7	10.7	1.57	1.68	1.36	1.36	16.8	18.0	14.5	14.5
Maj. Foreign Exporters	3.6	2.9	2.9	2.00	2.16	1.81	1.82	7.3	6.4	5.3	5.3
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.51	1.43	1.15	1.15	1.6	1.5	1.5	1.5
Canada	1.7	1.2	0.9	2.08	2.34	2.14	2.14	3.5	2.9	1.9	1.9
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.13	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.2	4.8	2.21	2.40	2.29	2.31	11.9	12.6	11.0	11.1
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.54	2.51	3.2	3.3	3.0	2.9
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.65	2.65	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.06	3.15	3.20	4.8	5.0	4.4	4.4
France	0.3	0.2	0.2	3.73	3.88	4.23	4.23	1.0	0.8	0.7	0.7
Germany	0.6	0.6	0.4	3.58	3.93	4.92	4.92	2.0	2.4	1.9	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.37	1.4	1.7	1.1	1.2
Norway	0.1	0.1	0.1	3.13	4.38	3.97	3.97	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.11	1.09	1.16	1.18	1.4	1.3	1.4	1.5
<u>RYE</u>											
World	16.3	15.8	13.1	2.16	2.27	2.01	2.01	35.2	35.9	26.6	26.4
United States	0.2	0.2	0.2	1.77	1.70	1.55	1.55	0.3	0.3	0.2	0.2
Total Foreign	16.1	15.7	13.0	2.17	2.27	2.02	2.01	34.8	35.6	26.3	26.1
Fmr. USSR 2/	10.7	10.4	8.5	1.87	2.02	1.59	1.59	20.1	21.0	13.5	13.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.70	1.86	1.86	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	2.7	2.7	2.7	2.75	2.67	2.62	2.62	7.3	7.2	7.0	7.0
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.3	2.3	2.3	2.73	2.61	2.58	2.58	6.2	6.0	5.9	5.9
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.39	3.66	3.68	5.2	5.3	4.5	4.4
Denmark	0.1	0.1	0.1	4.82	4.95	4.57	5.24	0.5	0.5	0.4	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.66	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.4	2.29	2.31	2.21	2.06	1.3	1.4	1.0	0.9

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Fmr. USSR covers the same area previously designated USSR . 3/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA		YIELD		PRODUCTION (Rough Basis)		MILLING RATE		PRODUCTION (Milled Basis)							
	Prel. 1989/90	Proj. 1991/92	Prel. 1990/91	1991/92 Proj. Mar. Apr.	Prel. 1990/91	1991/92 Proj. Mar. Apr.	Prel. 1990/91	1991/92 Proj. Mar. Apr.	Prel. 1989/90	1991/92 Proj. Mar. Apr.						
	—Million hectares—		—Metric tons per hectare—		—Million metric tons—		— Percent —		—Million metric tons—							
World	146.8	146.9	146.1		3.5	3.5	3.5		67.7	67.8	67.7	67.7	344.3	352.0	346.5	348.2
United States	1.1	1.1	1.1		6.4	6.2	6.3	6.3	7.0	7.1	7.0	7.0	5.1	5.1	4.9	5.0
Total Foreign	145.7	145.7	145.0		3.4	3.5	3.5	3.5	501.3	512.4	504.6	507.0	67.7	67.7	67.7	67.5
Maj. Foreign Exporters																
Burma	16.8	15.7	16.5		2.3	2.3	2.3	2.3	38.5	35.8	37.7	38.1	64.0	22.8	24.1	24.4
Pakistan	4.7	4.8	4.5		2.9	2.9	2.8	2.8	13.5	13.7	12.8	12.8	60.0	8.1	7.7	7.7
Thailand	2.1	2.1	2.0		2.3	2.3	2.4	2.4	4.8	4.9	4.9	4.8	66.7	3.2	3.3	3.2
	10.0	8.8	10.0		2.0	2.0	2.0	2.1	20.2	17.2	20.0	20.5	66.0	13.3	11.3	13.5
Major Importers																
EC-12	13.9	13.9	13.5		4.2	4.2	4.2	4.2	58.6	58.4	56.9	56.9	66.1	38.7	38.5	37.5
Indonesia	0.3	0.4	0.4		6.2	6.4	6.0	6.0	2.1	2.4	2.2	2.2	67.0	1.4	1.6	1.4
Nigeria	10.5	10.5	10.1		4.2	4.3	4.4	4.4	44.7	45.2	44.1	44.1	65.0	29.1	29.4	28.7
Republic of Korea	0.6	0.7	0.7		1.4	1.4	1.4	1.4	0.9	0.9	1.0	1.0	60.0	0.5	0.6	0.6
Other Maj. Import. 1/	1.3	1.2	1.2		6.5	6.2	6.1	6.1	8.1	7.7	7.4	7.4	72.5	5.9	5.6	5.4
	1.2	1.1	1.1		2.4	1.9	2.0	2.0	2.8	2.2	2.2	2.2	65.5	1.8	1.4	1.5
Other Foreign	114.9	116.1	115.0		3.5	3.6	3.6	3.6	404.2	418.3	410.1	412.0	68.3	275.9	285.6	280.0
Australia	0.1	0.1	0.1		8.1	8.9	8.2	8.2	0.8	0.8	1.1	1.1	71.5	0.6	0.5	0.7
Bangladesh	10.5	10.4	10.5		2.6	2.6	2.6	2.6	26.8	26.8	27.6	27.6	66.7	17.9	17.9	18.4
Brazil	4.3	4.6	5.1		1.7	2.1	1.9	2.1	7.2	9.5	10.0	10.8	68.0	4.9	6.5	7.3
China	32.7	33.1	32.6		5.5	5.7	5.7	5.7	180.1	189.3	186.0	186.0	70.0	126.1	132.5	130.2
India	42.2	42.6	41.1		2.6	2.6	2.6	2.6	110.4	111.9	106.5	106.5	66.7	73.6	74.6	71.0
Japan	2.1	2.1	2.0		6.2	6.3	5.9	5.9	12.9	13.1	12.0	12.0	72.8	9.4	9.6	8.7
Philippines	3.4	3.4	3.4		2.6	2.9	2.8	2.8	8.9	9.9	9.7	9.7	65.0	5.8	6.4	6.3
Fmr. USSR 2/	0.7	0.6	0.6		3.9	4.0	3.7	3.7	2.6	2.4	2.2	2.2	65.0	1.7	1.6	1.4
Vietnam	6.1	6.1	6.3		3.2	2.9	3.2	3.2	19.4	17.9	19.9	19.9	66.0	12.8	11.8	13.1
Others	12.9	13.1	13.3		2.7	2.8	2.7	2.7	35.1	36.7	35.1	36.2	66.1	23.2	24.3	24.0

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

2/ Fmr. USSR covers the same area previously designated USSR.

April 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Mar.	Apr.	1989/90	1990/91	Mar.	Apr.
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
<u>SOYBEANS</u>											
World	58.37	54.05	54.60	1.84	1.92	1.93	1.93	107.37	103.99	105.68	105.37
United States	24.09	22.87	23.45	2.17	2.29	2.30	2.30	52.35	52.42	54.04	54.04
Total Foreign	34.27	31.18	31.15	1.61	1.65	1.66	1.65	55.01	51.58	51.64	51.33
Maj. Foreign Exporters	16.35	14.45	14.80	1.90	1.89	1.96	1.95	31.09	27.25	29.00	28.80
Argentina	4.95	4.80	4.80	2.17	2.40	2.19	2.15	10.75	11.50	10.50	10.30
Brazil	11.40	9.65	10.00	1.78	1.63	1.85	1.85	20.34	15.75	18.50	18.50
Other Foreign	17.92	16.73	16.35	1.33	1.45	1.38	1.38	23.92	24.33	22.64	22.53
Canada	0.54	0.49	0.58	2.26	2.63	2.44	2.44	1.22	1.29	1.41	1.41
China	8.06	7.56	7.05	1.27	1.46	1.36	1.36	10.23	11.00	9.60	9.60
Eastern Europe	0.70	0.34	0.25	0.97	1.07	1.35	1.35	0.68	0.36	0.33	0.33
EC-12	0.63	0.69	0.54	3.13	3.10	3.10	3.11	1.98	2.14	1.68	1.68
India	2.25	2.37	2.60	0.80	1.02	0.85	0.85	1.81	2.42	2.20	2.20
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
Fmr. USSR 1/	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.73	2.36	2.39	1.53	1.54	1.49	1.47	4.17	3.63	3.61	3.50
<u>COTTONSEED</u>											
World	31.62	33.08	34.33	0.98	1.01	1.06	1.07	30.83	33.53	36.48	36.59
United States	3.86	4.75	5.20	1.10	1.14	1.18	1.18	4.24	5.42	6.13	6.13
Total Foreign	27.76	28.33	29.14	0.96	0.99	1.04	1.05	26.59	28.12	30.35	30.45
China	5.20	5.59	6.35	1.24	1.37	1.52	1.52	6.44	7.67	9.62	9.62
India	7.33	7.36	7.27	0.60	0.53	0.54	0.54	4.40	3.90	3.90	3.90
Pakistan	2.60	2.66	2.78	1.12	1.23	1.52	1.57	2.91	3.28	4.22	4.36
Fmr. USSR 1/	3.33	3.17	3.01	1.53	1.54	1.48	1.48	5.11	4.88	4.45	4.45
Others	9.30	9.55	9.74	0.83	0.88	0.84	0.83	7.74	8.40	8.15	8.12
<u>PEANUTS</u>											
World	19.82	19.42	20.15	1.11	1.15	1.14	1.13	22.06	22.27	22.74	22.67
United States	0.67	0.73	0.82	2.72	2.23	2.76	2.74	1.81	1.63	2.24	2.24
Total Foreign	19.15	18.69	19.33	1.06	1.10	1.07	1.06	20.25	20.64	20.50	20.44
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.98	1.81	2.19	2.08	2.08	5.37	6.37	6.20	6.20
India	8.71	8.30	8.75	0.93	0.92	0.86	0.86	8.10	7.62	7.50	7.50
Senegal	0.78	0.91	0.87	1.04	0.74	0.82	0.83	0.82	0.67	0.72	0.72
South Africa	0.09	0.09	0.20	1.28	1.21	1.50	0.56	0.11	0.10	0.14	0.11
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.74	5.81	0.87	0.88	0.89	0.88	5.12	5.07	5.14	5.10

FOOTNOTES AT END OF TABLE.

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Mar.	Apr.	1989/90	1990/91	Mar.	Apr.
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
<u>SUNFLOWERSEED</u>											
World	15.64	16.36	16.45	1.40	1.38	1.30	1.26	21.89	22.63	21.52	20.75
United States	0.72	0.75	1.08	1.10	1.38	1.51	1.51	0.80	1.03	1.64	1.64
Total Foreign	14.92	15.61	15.37	1.41	1.38	1.29	1.24	21.09	21.53	19.88	19.12
Argentina	2.80	2.30	2.50	1.36	1.70	1.56	1.40	3.80	3.90	3.90	3.50
China	0.72	0.71	0.75	1.49	1.88	1.47	1.47	1.06	1.34	1.10	1.10
EC-12	2.13	2.58	2.40	1.67	1.65	1.66	1.66	3.54	4.25	4.00	3.99
East Europe	1.27	1.23	1.24	1.81	1.70	1.71	1.71	2.29	2.09	2.13	2.13
Fmr. USSR 1/	4.46	4.67	4.50	1.59	1.41	1.25	1.25	7.07	6.56	5.64	5.64
Others	3.55	4.13	3.97	0.94	0.82	0.77	0.69	3.33	3.39	3.11	2.76
<u>RAPESEED</u>											
World	17.10	18.23	20.46	1.28	1.38	1.39	1.40	21.86	25.12	28.46	28.59
United States	0.03	0.03	0.06	1.58	1.74	1.43	1.43	0.05	0.05	0.08	0.08
Total Foreign	17.07	18.19	20.40	1.28	1.38	1.39	1.40	21.81	25.06	28.38	28.51
Canada	2.90	2.58	3.27	1.07	1.27	1.32	1.32	3.10	3.28	4.30	4.30
China	4.99	5.50	6.10	1.09	1.26	1.20	1.22	5.44	6.96	7.30	7.44
EC-12	1.81	2.13	2.42	2.96	2.89	3.05	3.05	5.34	6.14	7.39	7.39
East Europe	0.81	0.74	0.69	2.66	2.38	2.30	2.30	2.15	1.75	1.58	1.58
India	4.97	5.72	6.30	0.83	0.90	0.95	0.95	4.13	5.15	6.00	6.00
Others	1.59	1.52	1.63	1.04	1.17	1.06	1.11	1.66	1.77	1.81	1.80
<u>FLAXSEED</u>											
World	3.68	3.74	3.42	0.50	0.61	0.61	0.61	1.84	2.27	2.10	2.10
United States	0.07	0.10	0.14	0.47	0.95	1.14	1.14	0.03	0.10	0.16	0.16
Total Foreign	3.62	3.64	3.29	0.50	0.60	0.59	0.59	1.81	2.18	1.94	1.94
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.53	0.83	1.29	1.30	1.30	0.50	0.94	0.69	0.69
India	1.12	1.15	1.10	0.29	0.30	0.32	0.32	0.33	0.34	0.35	0.35
Fmr. USSR 1/	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.39	0.67	0.77	0.94	0.94	0.24	0.26	0.36	0.36
<u>MAJOR OILSEEDS</u>	146.23	144.87	149.41	1.41	1.45	1.45	1.45	205.85	209.82	216.98	216.07
United States	29.44	29.23	30.74	2.01	2.08	2.09	2.09	59.29	60.72	64.29	64.28
Total Foreign	116.79	115.64	118.67	1.25	1.29	1.29	1.28	146.56	149.10	152.69	151.79
<u>COPRA</u>	--	--	--	--	--	--	--	4.90	4.69	4.57	4.57
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.33	3.32	3.50	3.49
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	214.08	217.83	225.05	224.13
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	10.91	11.22	11.72	11.69

1/ Fmr. USSR covers the same area previously designated USSR. 2/ Not included in total oilseeds.

TABLE 7

Cotton Area, Yield, and Production **World and Selected Countries and Regions**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Mar.	Proj. Apr.	Prel. 1989/90	1991/92 1990/91	Proj. Mar.	Proj. Apr.
	---Million hectares---			---Kilograms per hectare---				---Million 480-pound bales---			
World	31.6	33.0	34.3	551	573	607	606	79.9	87.0	95.5	95.4
United States	3.9	4.7	5.2	688	711	735	735	12.2	15.5	17.5	17.5
Total Foreign	27.7	28.3	29.1	532	550	584	583	67.7	71.5	77.9	77.8
Maj. Foreign Exporters	13.1	13.2	14.0	725	791	849	847	43.5	48.0	54.1	54.4
Australia	0.2	0.3	0.3	1,271	1,604	1,340	1,340	1.4	2.0	1.7	1.7
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.4	728	807	891	891	17.4	20.7	26.0	26.0
Egypt	0.4	0.4	0.4	683	719	816	816	1.3	1.4	1.4	1.4
Mexico	0.2	0.2	0.3	891	914	704	707	0.8	0.8	0.8	0.8
Pakistan	2.6	2.7	2.9	560	615	761	756	6.7	7.5	9.7	10.0
Sudan	0.3	0.2	0.2	456	422	494	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	947	947	2.8	3.0	2.6	2.6
Fmr. USSR 2/	3.3	3.2	3.0	796	820	817	817	12.2	11.9	11.3	11.3
Major Importers 3/	0.4	0.4	0.3	887	785	855	859	1.5	1.4	1.4	1.4
Other Foreign	14.3	14.7	14.7	346	327	330	326	22.6	22.1	22.4	22.0
Argentina	0.6	0.6	0.6	486	468	415	415	1.3	1.4	1.2	1.2
Brazil	1.9	2.0	2.1	347	352	376	376	3.0	3.2	3.8	3.6
India	7.3	7.4	7.3	315	270	274	274	10.6	9.1	9.1	9.1
Syria	0.2	0.2	0.2	930	928	979	979	0.7	0.7	0.9	0.9
Others	4.3	4.6	4.6	357	368	359	346	7.0	7.7	7.5	7.3

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Fmr. USSR covers the same area previously designated USSR.

3/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

April 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 10-year record of the difference between the April projections and the final estimates. Using world wheat production as an example, changes between the April projection and the final estimate have averaged 2.7 million tons (0.5 percent) and ranged from -6.8 to 6.5 million tons. The April projection has been below the final 6 times and above the final 4 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1990/91 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	--- <i>Million metric tons</i> ---			Number of years 2/	
WHEAT						
World	0.5	2.7	-6.8	6.5	6	4
U.S.	0.1	0.0	-0.1	0.1	4	2
Foreign	0.6	2.7	-6.8	6.5	6	4
COARSE GRAINS 3/						
World	0.6	4.4	-8.0	4.3	7	3
U.S.	0.1	0.2	-0.2	1.3	6	1
Foreign	0.8	4.5	-8.0	4.3	7	3
RICE (Milled)						
World	1.3	4.0	-9.0	1.3	9	1
U.S.	1.3	0.1	-0.2	0.1	4	1
Foreign	1.3	4.0	-9.0	1.3	9	1
SOYBEANS						
World	1.7	1.6	-2.5	1.8	5	5
U.S.	1.2	0.6	-1.1	1.8	4	5
Foreign	2.5	1.1	-2.2	1.9	8	2
			--- <i>Million 480-lb. bales</i> ---			
COTTON						
World	0.8	0.7	-3.0	0.1	7	2
U.S.	0.1	0.0	0.0	0.1	3	2
Foreign	1.0	0.7	-3.0	0.1	6	4
UNITED STATES			----- <i>Million bushels</i> -----			
CORN	0.1	5	-8	38	1	1
SORGHUM	0.1	1	0	4	0	2
BARLEY	0.5	2	-3	11	6	1
OATS	0.1	0	-2	0	3	0

1/ The final estimate for 1981/82-1990/91 is defined as the first November estimate following the marketing year.

2/ May not total 10 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

APRIL 10, 1992



1 - UNITED STATES

A hard freeze damaged some winter wheat in the southern Great Plains and early blooming of fruit buds in the southeast. Wet soils slowed planting progress and crop growth in most southern States. Drought continues a concern in the west.

2 - SOUTH AMERICA

Mid-March rains benefit late-planted soybeans in Argentina, while recent dryness favors summer crop harvesting. In southern Brazil, drier weather is needed as recent heavy rains delay soybean harvesting and possibly cause flooding.

3 - EUROPE

Substantial rain in early April improves conditions for winter grain development and spring crop preparations throughout the west and south. Moisture is adequate for early spring growth in the northeast but rain is needed for crops from Hungary to Greece.

4 - FORMER USSR

Continued unseasonably mild weather promotes greening of winter grains in the south. Reports indicate winter grains are in good condition with winterkill below average.

5 - SOUTH AFRICA

Rain is generally too light for winter wheat planting.

6 - SOUTH ASIA

March rain possibly lodges some wheat in northern Pakistan. Conditions elsewhere favor maturing grains and oilseeds, but heat stresses livestock in southern India.

7 - EASTERN ASIA

Continued dryness depletes soil moisture for developing winter wheat. Moisture is needed during the next few weeks to prevent reduction in wheat yield potential. Abundant to excessive rains increase irrigation supplies for early rice, but cause flooding in portions of southern China.

8 - SOUTHEAST ASIA

Rain continues for Indonesia's rice. Hot, dry weather dominates northern Thailand, where rain is needed for corn planting.

9 - AUSTRALIA

Dry conditions in March favor eastern summer crop maturation and early harvesting. However, recent showers in northeastern sugarcane areas improve growing conditions, following below normal March rainfall.

10-NORTHWESTERN AFRICA

Widespread rain since late March over Morocco eases severe drought, stabilizing conditions for winter grains. In Tunisia below-normal precipitation limits moisture for winter grains in the heading stage.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

SOUTHERN EUROPE: SPRING RAINFALL EASES DRYNESS

Rainfall was locally heavy during the period of March 25 - April 10, 1992, across Spain, Portugal, France, and Italy. This beneficial rainfall brought some relief to winter grains affected by drought during the autumn and winter of 1991/92. However, wheat and barley in the Iberian Peninsula that had already advanced into the reproductive stage suffered irreversible damage before the substantial rainfall. Precipitation was greater than 100 millimeters across portions of Spain and Portugal during this 16-day period and about 50 millimeters across France and Italy. The improvement in soil moisture also will benefit pastures and spring-sown crops.

NORTHWEST AFRICA: RAINFALL BENEFITS WINTER GRAINS

During the period of March 22 - April 10, 1992, rainfall was widespread and frequent across most major winter grain regions of Morocco and Algeria. This rainfall, from central Morocco across Algeria, greatly improved conditions for reproductive winter grains. In Morocco, hardest hit by this winter's drought, precipitation halted further deterioration but was insufficient and the crop too far advanced to benefit yield. Widespread portions of northern Morocco and Algeria received 50-100 millimeters during this period while southern Morocco received 12-25 millimeters. Weather turned unfavorably dry for winter grains across most of Tunisia's winter grain region during March and early April 1992. Until that time, yield forecasts looked favorable for Tunisia's winter grain crop as autumn and winter precipitation levels were generally above-normal.

PRODUCTION BRIEFS

BRAZIL: FINANCIAL SUPPORT FOR SUMMER CROPS

On March 13, the Brazilian Government announced its intention to provide financial support for summer crop marketing loans and winter plantings. The objective is to support producers with fewer direct production subsidies and alter current farm policy that is perceived to encourage production for Government stocks. Soybeans will be excluded from a number of the proposed changes in order to favor the production of basic commodities, such as corn. Future policy additions may include a tax exemption for producers of basic food commodities. The main points of the new support program are as follows:

- o Marketing loans will be available from rolled-over production loans of US\$3.25 billion, plus new funds equal to approximately US\$162.00 million.
- o Producers can finance 100 percent of their crop for 180 days.
- o Loans must be repaid in cash, except for small "basic food" farmers and cotton producers of any size. These producers can repay loans with their respective commodities. Soybeans can no longer be used to repay loan obligations.
- o With the exception of soybeans, interest rates will be the same as for production loans. Interest rates for soybean producers will increase from 12.5 percent to 18 percent, plus monetary correction.
- o Processors, traders, and exporters have access to the program, but at commercial interest rates.
- o If market prices fall below minimum prices, the Government proposes that the commodity be auctioned through the local grain exchange and the difference be paid by the Government. Soybeans are not included in this portion of the program.

BRAZIL: RECENT RAINFALL MAY REDUCE COTTON QUALITY AND YIELD

The cotton producing areas of Parana and Sao Paulo have been experiencing persistent and excessive rainfall in recent weeks. The frequent rains are likely to impair crop quality and may lower yields. A reduction in quality could further reduce already low producer prices, worsening the farmers' financial situation. Currently, market prices are below the official minimum price because of the large harvest projected for 1992. The minimum price for 1991/92 seed cotton is now US\$0.148 per pound.

BULGARIA: LIVESTOCK NUMBERS DOWN SHARPLY IN 1991

According to the U.S. agricultural counselor in Sofia, the Ministry of Agriculture's January 1, 1992 census report shows a reduction in livestock numbers at the end of 1991. The drop in inventory reflects Bulgaria's weak economic conditions, the end of State subsidies to State farms, and disruption in sales to the Soviet market. Cattle numbers declined 10 percent in 1991, to 1.31 million head, due to a 16-percent drop in the State sector. The small, private sector expanded cattle numbers by 7 percent, to 418,300 head. Hog numbers declined 25 percent, to 3.14 million head. The number of hogs on State farms dropped 26 percent. Hog numbers in the private sector decreased by 21 percent, to 820,000 head. Sheep inventories fell by 16 percent, to 6.70 million head. The State sector recorded a 28-percent decline, but the private sector finalized the year with a 3-percent increase, to 3.26 million head.

CANADA: STATISTICS CANADA FORECASTS 1992/93 PLANTED AREA

According to Statistics Canada's March 1, 1992 farmer survey, wheat area during the 1992/93 season is forecast to rise 1 percent from last year's record area. Oat sowings are expected to increase, while barley, corn, flaxseed, and soybean seedings are forecast lower. Rapeseed planted area is expected to remain unchanged, but summerfallow is projected to fall 3 percent from last year's level. Over the past ten years, Statistics Canada's wheat area forecast has been within 2 percent of the final seeded area. USDA will release its first 1992/93 Canadian production, supply, and demand estimates for grain in May and oilseeds in July.

PLANTED AREA FORECAST FOR 1992/93

Year	Wheat	Barley	Corn	Oats	Rapeseed	Soybean	Flaxseed
	----- Million hectares -----						
1992/93 1/	14.8	4.6	1.0	1.5	3.3	0.5	0.4
1991/92 2/	14.5	4.9	1.0	0.9	3.3	0.6	0.5
1990/91 2/	14.4	4.7	1.0	1.2	2.6	0.5	0.7

1/ Statistics Canada planted area forecast.

2/ USDA estimated harvested area.

CHINA: MEAT PRODUCTION UP IN 1991

According to the U.S. agricultural counselor in Beijing, the Chinese Ministry of Agriculture recently released data on 1991 red meat production and hog inventories. China produced 27.23 million tons of red meat during 1991, up 8 percent from 1990 and 7 percent above the March 1992 estimate (WAP 3-92). During 1991, pork production totaled 24.52 million tons, a 7-percent increase from both last year and the March estimate. Hog numbers at the start of 1992 expanded to 372.00 million head, 3 percent above 1991 starting numbers and 3 percent above the March estimate. The continued growth in hog numbers and the currently good feed supply level make it likely that 1992 pork production--currently estimated at 23.00 million tons--actually will be closer to 25.00 million tons. Beef and veal production for 1991 totaled 1.53 million tons, up 22 percent from 1990 and 12 percent above the March estimate. Sheep and goat production, at 1.18 million tons, was up 10 percent from 1991 and 4 percent above the March estimate.

CHINA: WINTER RAPESEED CONDITION BETTER THAN EXPECTED

March field travel by the U.S. agricultural attache in Beijing found winter rapeseed in better condition than earlier expected. The attache's travel itinerary included Zhejiang, Jiangsu, and Anhui provinces. Together, these provinces account for 32 percent of China's total rapeseed production. Chinese central authorities had down-graded yield expectations for the rapeseed crop due to freezing temperatures in December, but field observations and local sources confirmed that the freeze had only a slight effect on yields.

In Anhui province, the northern region sustained a hard December freeze. However, 85 percent of the rapeseed crop is grown in southern Anhui near the provincial capital of Hefei. Officials in the province of Zhejiang reported freeze damage over several days in December, but subsequent conditions have been favorable and yields are expected to be near normal.

FORMER USSR: PRODUCTION OF MEAT AND MILK DOWN IN 1991

The U.S. agricultural counselor in Moscow, citing official sources, reported the following data for meat and milk production in the newly independent states of the former USSR. Meat production is on a slaughter weight basis and includes both red and poultry meats.

<u>Country</u>	<u>1991 Production</u>		<u>Percent of 1990 Production</u>	
	<u>Meat</u> (1,000 tons)	<u>Milk</u>	<u>Meat</u>	<u>Milk</u>
Armenia	89	400	96	93
Azerbaijan	162	900	92	98
Byelarus	1,124	6,900	95	92
Kazakhstan	1,550	5,500	99	98
Kyrgyzstan	240	1,100	95	95
Moldova	303	1,300	83	86
Russia	9,251	52,100	91	93
Tajikistan	87	600	81	97
Turkmenistan	103	400	98	102
Ukraine	4,084	22,700	94	93
Uzbekistan	474	3,300	98	108
Total	17,465	95,200	93	94

COSTA RICA: MILK PRODUCTION UP IN 1991

Milk production during 1991 totaled 455,000 tons, 6 percent above the 1990 level, according to the U.S. agricultural attache in San Jose. Production is expected to expand again in 1992. One of the major factors contributing to the projected increase in 1992 is a recent Government decree requiring that prices for milk and milk products reflect production costs. With minimum profits guaranteed, producers have responded with increased output and surpluses are beginning to accumulate.

INDIA: TEA PRODUCTION HITS RECORD LEVEL

India's tea production during 1991 surpassed all preliminary forecasts to reach a record 742,000 tons, 4 percent above the 1990 harvest of 714,665 tons, according to the U.S. agricultural counselor in New Delhi. Ideal weather conditions throughout the year in the southern growing regions boosted the south's production by 9 percent, to 185,000 tons. Production in the northeast rose by only 2 percent, to 557,000 tons, as the early onset of cold weather in the north brought plucking operations to a standstill in December.

Production of cut, tear, and curl teas totaled 578,000 tons in 1991, 2 percent above the 1990 level. Production of orthodox teas surged 10 percent, to 155,000 tons. Green tea output remained unchanged at 9,000 tons. Production of instant tea was approximately 1,000 tons.

NETHERLANDS: HORMONE USE INCREASES

The use of growth hormones on cattle remained a major problem during 1991, according to the U.S. agricultural counselor in The Hague. Based on survey inspections carried out by the Ministry of Agriculture between January and May 1991, the incidence of growth hormones was three times higher than in 1990. In September 1991, the Dutch Ministry of Justice uncovered a major distribution system for the hormone, clenbuterol, and other illegal veterinary antibiotics. As a result of these incidents, a proposal was made by the Dutch Parliament to withhold payment of the EC beef premium if the cattle producer refused to permit hormone testing one week prior to slaughter. However, the proposal was not approved by the Dutch Ministry of Agriculture because the premium in question is paid by the EC, not by the Government.

SPAIN: SUNFLOWER PLANTINGS REPLACE CORN

The U.S. agricultural counselor in Madrid projects that 1992 sunflower plantings in southern Spain will replace an estimated 0.20 million hectares of corn. Seventy-five percent of sunflowers in this region are normally irrigated. The switch to sunflowers from corn is a result of the dry conditions experienced this past winter and the incentives of the new European Community oilseed price support regime. Early planting reports suggest that total sunflower area could reach 1.40 million hectares, a substantial increase from last year's estimated 1.07 million. The new area-based guaranteed threshold for Spain's sunflower support price is 1.40 million hectares. It is reported that Spain has requested an increase in its' current area threshold level to prevent a potential reduction in the producer price support.

THAILAND: SWINE PRODUCTION SITUATION

Swine production increased only 2 percent in 1991 compared to a 4-percent rate in 1990 when slaughter reached 7.25 million head, according to the U.S. agricultural attache in Bangkok. Low profits in 1990 and significantly higher investment costs discouraged producers from expanding their operations in 1991. In addition, 1991 production was down on many farms that experienced flooding and outbreaks of foot-and-mouth disease in 1990. On several large farms in the eastern provinces, hog production was terminated when owners sold their land to developers. Swine production should resume a growth rate of 4-5 percent in 1992 due to higher prices and better supplies of vaccine to handle disease problems.

Because of the slow growth in pork production, demand outstripped supply and Bangkok wholesale hog prices rose to record levels in mid-1991. In an effort to resolve the pork shortage and stabilize prices, several control measures were introduced by the Government. In July 1991, some of the controls on both slaughter and interprovincial trade were relaxed. In August, the Government agreed to reduce the import tariff on live hogs and pork. In September, the Government granted licenses for the importation of 10,000 head of live slaughter hogs from Malaysia. Efforts to control retail prices carried over into January 1992 when the Government established ceiling prices for three of the major pork cuts.

UNITED STATES: PLANTING INTENTIONS REPORTED

The National Agricultural Statistics Service reported in the March 31, 1992 Prospective Plantings report that the intended food grains area (wheat and rice) is expected to total 29.6 million hectares, up marginally from last year. Area planted to feed grains (corn, oats, barley, and sorghum), at 43.6 million hectares, is up 3 percent from 1991. Producers intend to plant 32.0 million hectares of corn for all purposes in 1992, up 4 percent from last year and 7 percent above 1990. If realized, this would be the largest corn area since 1985. The intended 1992 oilseeds area (soybeans, cotton, peanuts, sunflowers, and flaxseed) of 30.4 million hectares is down 4 percent from last year. Soybean plantings are projected at 23.2 million hectares, 3 percent below 1991, and, if realized, will be the lowest since 1976. Flaxseed plantings in 1992 are expected to total 99,550 hectares, 30 percent below 1991 and potentially the second lowest on record.

United States Crop Summary
Area Planted and 1992 Intentions

CROP	1990	1991	1992 1/	1992/91
	----- (Million hectares) -----			Percent
Corn	30,016,260	30,736,610	31,973,340	104.0
Sorghum	4,263,410	4,457,260	4,901,610	110.0
Oats	4,218,080	3,502,190	3,373,900	96.3
Barley	3,326,960	3,618,330	3,362,970	92.9
All wheat	31,258,660	28,290,260	28,359,460	100.2
Winter	23,046,290	20,659,020	20,358,340	98.5
Durum	1,444,740	1,316,460	1,025,890	77.9
Other Spring	6,767,630	6,314,780	6,975,240	110.5
Rice	1,172,390	1,156,200	1,212,050	104.8
Soybeans	23,389,060	23,900,990	23,235,280	97.2
Peanuts	744,630	826,460	754,540	91.3
Sunflower 2/	770,930	1,110,060	892,340	80.4
Flaxseed 3/	105,220	142,050	99,550	70.1
All Cotton	4,997,150	5,723,850	5,458,660	95.4
Upland	4,903,550	5,623,980	5,357,080	95.3
Amer-Pima	93,600	99,880	101,580	101.7
Hay 4/	24,850,800	25,323,480	24,572,780	97.0
Dry Edible Beans	881,250	772,590	606,470	78.5
Sweetpotatoes	38,000	32,700	33,710	103.1
Tobacco	296,760	308,010	311,690	101.2
Sugarbeets	566,730	575,060	584,490	101.6

1/ Intended plantings in 1992 as indicated by reports from farmers.

2/ Estimates for 1990 includes only KS, MN, ND, SD, and TX.

3/ Estimates for 1990 includes only MN, ND, and SD.

4/ Area harvested.

FEATURE COMMODITY ARTICLES

Agricultural Situation in South Africa and Zimbabwe

Foreign Agricultural Service personnel recently traveled in the Republic of South Africa and Zimbabwe to assess the current agricultural situation. The two countries have suffered from a severe drought since January and both have experienced serious grain, oilseed, cotton, and livestock production losses. Food shortages already have started to appear in subsistence areas and some of the populace are beginning to migrate to the cities in search of food. Soil moisture conditions for winter wheat planting are far below normal and water supplies for domestic, agricultural, and industrial uses are critically short in many areas, especially in Zimbabwe. Conditions are expected to deteriorate during the dry season, which starts in April and lasts until October. The economic impact of the drought on farmers, consumers, and the national economies of both countries is expected to be heavy and long-lasting.

South Africa

The latest Ministry of Agriculture estimate for 1991/92 corn production on commercial farms is 2.1 million tons. Production on communal farms is not expected to exceed 125,000 tons. Total corn production is estimated at 2.2 million tons, down 73 percent from last year and the smallest crop in more than 20 years. The national average yield is forecast at only 0.61 tons per hectare, compared to a five-year average yield of 2.46 tons per hectare.

An official from the Maize Board said farmers are expected to retain about 1.0 million tons on the farm and sell the remainder to the Maize Board, the Agency that handles all commercial corn marketing in South Africa. An official of the National Association of Maize Producers (NAMPO) indicated that the corn production trend, over the last few years, has been toward lower area and lower inputs. The official said that corn area is expected to stabilize at 2.8 to 3.0 million hectares and production at 6.0 to 7.0 million tons, which is close to normal domestic demand. About one-half of this demand is for white corn that is used to produce a finely ground cornmeal, which is an important part of the South African diet.

The drought damage to the 1991/92 grain and oilseed crops was evident throughout South Africa's major grain-producing provinces. In eastern Transvaal and eastern Orange Free State, conditions were dry and the 1991/92 grain crop is expected to be poor. Some corn areas were in fair condition, particularly in the Transvaal near Pretoria and in northern Orange Free State near Bethel, but most of the corn in the region was stunted and shriveled. The sunflower crop was also poor and the few sorghum fields observed were only slightly better. Many of the corn fields were being cut for silage or used for grazing because yields were evidently too low to justify the cost of harvesting. Officials at the Small Grains Institute in Bethlehem said that regional soil moisture conditions were so poor for winter wheat planting, which normally occurs from May through July, that only 10 to 20 percent of a normal crop may be planted for 1992/93 unless the area gets above-normal rainfall in April.

In southern Orange Free State, where rainfall is normally lower and soils are less fertile, summer and winter crop production is combined with extensive livestock grazing. Scattered showers in March improved pasture conditions in a few areas. However, the rain was insufficient and too late to help the summer crops. Corn and sunflowers were in poor condition, stressed by low precipitation and hot temperatures in January and February. Grazing conditions were generally poor in this area and many farmers have been forced to sell off livestock because of inadequate feed supplies for the winter.

Although erratic weather in western Transvaal makes agriculture a risky undertaking, this is a prime corn-growing area. Dryland corn yields can reach 3.0 to 4.0 tons per hectare under the right conditions and commercial farmers can make a profit in good years, helping them survive the bad ones. If the rainfall is good in this area, many other crops, including peanuts and sunflowers, also can produce well. However, western Transvaal suffered from the drought this year, and the corn crop was one of the poorest in the country. In this and other areas of South Africa, many of the farmers are in financial difficulty and hundreds are going bankrupt under a heavy load of accumulated debt and high interest rates. Sales of farm machinery and agricultural inputs are down significantly and small, rural towns are starting to show the effects of the slowdown.

Zimbabwe

The agricultural situation in Zimbabwe also is bleak this year. While some parts of northern and eastern Zimbabwe received near-normal rainfall during the 1991/92 growing season, most of the country was hit by a drought that local officials said was the worst in 50 years. Total corn production in 1991/92 is forecast at 515,000 tons, down 68 percent from a year earlier. The Government is assuming that virtually all of this production will be retained on-farm and imports of corn will be necessary to meet its demand for cornmeal and feed corn. Knowledgeable sources say that unless there are unusual rains in coming weeks a severe shortage of irrigation water could reduce 1992/93 wheat area by up to 90 percent. Tobacco, Zimbabwe's most important cash crop, was not seriously affected by the drought, but the 1991/92 oilseed and cotton crops are forecast to decline by one-half.

Field travel from Harare in northern Zimbabwe to Masvingo, 270 kilometers to the south, revealed sharp agricultural differences. Harare is situated in the center of the richest agricultural region in the country. Good soils, abundant rainfall, mild temperatures, and modern agricultural methods normally allow commercial farmers to raise a wide variety of products, including corn, oilseeds, cotton, citrus, cut flowers, cattle, and tobacco. The emphasis is on high quality crops. Corn is naturally dried in the field to reduce broken kernels, cotton is hand-picked several times during the season, and tobacco is flue-cured on-farm. However, this year the region had well-below-normal rainfall and some crops suffered from drought stress, but were not a total loss. The average dryland corn yield was an estimated 2.00 tons per hectare, one-half the average yield, although some irrigated corn north of Harare was expected to yield up to 8.00 tons per hectare. The commercial farmers expect to have some financial difficulties, but most of them indicate that they have sufficient resources to last the year. The drought has had a much stronger affect on farmers in the region's over-populated communal areas, where small plots of dryland corn, tobacco, and other crops are cultivated on marginal land

with few inputs and little technical assistance. In years with good weather, communal farmers usually can grow enough to support themselves and produce a small surplus that they market in nearby towns. However, crop production this year will be much lower than normal and Government food assistance will be necessary.

South and west of Harare, the land becomes increasingly arid. Fertile cropland gradually gives way to the characteristic savannah and bush of central Zimbabwe, where livestock raising becomes the predominant agricultural activity. The pastures and dryland crops in this region clearly showed the effects of low rainfall and record-high summer temperatures that marked this year's drought. The grass was tinder-dry and sparse, especially in the communal areas where over-grazing is a persistent problem. The shortage of feed and fodder supplies will only get worse. Many farmers have started to sell their cattle to prevent them from starving during Zimbabwe's long, dry winter season. The scattered fields of dryland corn, tobacco, beans, and other row crops were in very poor condition, and most of the fields are expected to be abandoned.

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TABLE 9

South African Corn Harvested Area, Yield, and Production

Year	Area (MHa)	Yield (MT/Ha)	Production (MMT)
80/81	4.34	3.38	14.66
81/82	4.28	1.95	8.36
82/83	4.07	1.00	4.08
83/84	3.95	1.12	4.41
84/85	3.91	2.08	8.14
85/86	4.05	2.00	8.08
86/87	4.03	1.77	7.15
87/88	3.66	1.93	7.08
88/89	3.78	3.28	12.38
89/90	3.48	2.56	8.90
90/91	3.03	2.74	8.30
91/92	3.25	0.69	2.23

TABLE 10

Zimbabwe Corn Harvested Area, Yield, and Production

Year	Area (MHa)	Yield (MT/Ha)	Production (MMT)
80/81	1.44	1.92	2.77
81/82	1.41	1.27	1.79
82/83	1.32	0.67	0.88
83/84	1.36	1.03	1.40
84/85	1.43	2.07	2.95
85/86	1.26	2.03	2.55
86/87	1.20	0.92	1.10
87/88	1.24	1.80	2.23
88/89	1.24	1.56	1.93
89/90	1.13	1.93	2.17
90/91	1.10	1.44	1.59
91/92	0.88	0.59	0.51

1992 WINTER GRAIN PROSPECTS IN THE NORTHERN HEMISPHERE
OUTSIDE THE UNITED STATES

SUMMARY: Winter grains account for approximately one-third of the world's total wheat and coarse grain output. This season, winter grain prospects in the Northern Hemisphere outside the United States are varied. In the newly independent states of the former USSR there was a mild winter, with no significant reports of winterkill. In parts of Western Europe, Eastern Europe, China, Northwest Africa, and India, a drier-than-normal fall and winter stressed crops and favorable spring rains are needed to prevent yield loss. Winter grains area is estimated up from last year in the former USSR, Canada, and Western Europe, but down in India, China, Mexico, and Eastern Europe.

Western Europe: Winter grains area is expected to increase marginally from last year. Winter grains in northern Europe from Belgium to Germany had favorable fall and winter weather. However, the rest of Europe, from the United Kingdom across Spain to Greece, had below normal rainfall over the fall and winter months causing low reservoir and subsoil moisture levels. Although recent rainfall relieved some crop stress, continued precipitation is needed in coming weeks. Temperatures throughout Europe have been mild and no significant winterkill has been reported.

- o **France:** Soft wheat sowings for 1992 are expected to be up 2 percent from last year, while durum area is down 12 percent and barley plantings are virtually unchanged. Area is seen stabilizing as additional plantings of oilseeds will basically offset any reductions resulting from the French and EC set-aside programs. Rainfall in northern and central France generally was favorable over the winter months. After a brief, dry period toward the end of winter, precipitation has returned and continued rainfall is necessary in the next couple months to sustain normal development.
- o **United Kingdom:** Winter wheat area is expected to increase slightly from last year due, in part, to low participation in the 1-year set-aside program and a shift out of rapeseed. Feed wheat varieties are expected to account for about 80 percent of the total wheat area as producers continue to focus on high yields instead of quality. Winter barley is estimated to have declined following a trend which began in 1985 and will likely continue until prices improve. Rainfall is needed to replenish soil moisture reserves resulting from a dry, but mild winter.
- o **Italy:** Winter wheat area is reported to be marginally higher than last year. The increase in area disrupts the long-term trend of lower plantings. The EC set-aside program has not significantly affected the winter grains area, even in the less productive areas of the South. Excessive rainfall in the North hampered planting. However, the weather turned dry during the winter. Recent rains have improved soil moisture conditions.
- o **Germany:** Winter wheat and barley plantings are estimated to rise above last year's levels. In the fall, favorable weather encouraged plantings and the winter was mild with favorable moisture. However, subsoil moisture deficiencies in many regions, the result of 2 preceding dry years, mean favorable moisture will be needed this spring. For the 1992/93 season, farmer participation in the EC set-aside programs is estimated at 0.8 million hectares, the highest in the EC.

- o Spain/Portugal: Winter grains area in Spain is expected to be lower due to a lack of adequate precipitation during the fall and winter months that prevented normal plantings and germination. Increased set-aside area and expected additional sunflower plantings this spring also reduced winter grains area. In Portugal, winter wheat and barley sowings are expected lower due to unfavorable weather. This caused farmers to reduce area. The lack of adequate moisture has severely stressed crops that were already planted.
- o Belgium/Luxembourg: Winter grains area is estimated to be little changed from last year. Wheat area is continuing to increase at the expense of barley. Favorable weather has been reported throughout the growing season to date.
- o Denmark: Winter wheat sowings are expected to remain largely unchanged this year as increased price competition from other crops has inhibited expansion. Over the last few years, Denmark has shifted from production of excellent bread-making wheat varieties to poor quality, but higher-yielding varieties. Winter barley is projected to decline significantly due to the uncertainty of EC grain policy. However, total barley area will likely be up as spring barley area rises. A mild winter has reduced winterkill, but encouraged disease and early spraying is expected.
- o Greece Winter grains plantings are estimated up 4 percent this year. Area devoted to soft wheat varieties is expected to increase slightly from last year, reversing the downward trend of the past 5 years. However, durum plantings are expected to decline from last year's record level of 0.8 million hectares. Barley area is expected to be virtually unchanged from last year's 0.2 million hectares. Late fall planting conditions were favorable, but the winter has been dry. Recent rains relieved crop stress, but continued spring precipitation will be needed.

EASTERN EUROPE: Winter grain conditions in Eastern Europe are generally mixed owing to a pattern of winter storm systems which favored the northern areas. Well-below-normal precipitation has plagued the Balkan region since late summer. Romania, Bulgaria, and Yugoslavia are in the worst condition, with winter precipitation 20 percent below average. The northern countries of Poland, Czechoslovakia, and Hungary have received adequate moisture and crops are believed to have over-wintered well. Area sown to winter grains is expected to be down significantly in Eastern Europe due to continuing agro-economic disruptions, ongoing privatization efforts, and poor moisture conditions in the Balkans.

- o Poland: Winter grains have benefited from generally favorable fall and winter showers. However, sown area has reportedly declined and crop input use has been reduced. Grain prices were sluggish throughout the past year due to faltering feed industry demand and limited exports.
- o Czechoslovakia: Autumn and winter rainfall have been favorable this year, and will likely benefit over-wintering grains. Precipitation has averaged 100 percent of normal, or better, since early September.

- o Romania: The outlook for winter grains is unfavorable due to poor rainfall and soil moisture conditions during the fall and winter. Reportedly, wheat area has declined slightly from last year, while planting efforts were seriously delayed owing to fuel shortages. In addition, land reform efforts, economic and political upheavals, scarce and expensive inputs, and controlled prices have all reduced producer incentives this year.
- o Yugoslavia: Sowing conditions in the bulk of the country were favorable for winter grains. However, wheat area may be down as much as one-third from last year due to a delayed corn harvest, fuel and labor shortages, rainy weather, and the ongoing economic and political conflicts that have engulfed the country. Rainfall during the winter months has been well-below-normal in the Vojvodina heartland, but soil moisture reserves from the fall have likely prevented serious crop stress.

FORMER USSR: For the fourth consecutive year, the major winter grain producing areas have experienced a milder-than-normal winter. At planting, moisture conditions were favorable in the northern and western areas. However, below normal precipitation during September and most of October over the southern Ukraine, northern North Caucasus, parts of the Black Soils Region, and the lower Volga Valley created limited moisture at sowing time. As a result, conditions for crop establishment were less favorable than the previous 2 years. Although no total winter grain area figures have been released, by state to date, it appears that this year's winter grain area will be up at least 3 million hectares from last year's 30.4 million. In fact, the Russian Federation reported on November 2, 1991 that 19.9 million hectares of winter grains had been sown, compared to 16.5 million in the fall of 1990. Although no total area figures have been released specifying the number of hectares plowed in the fall for spring sowing, the Russian Federation did report that the area prepared for spring sowing was up 14 percent over last year. In the area comprising the newly independent states of the former Soviet Union, approximately 120 million hectares are normally plowed in the fall with an additional 20 million plowed in the spring.

Winterkill is expected to be below the long-term average and close to last year's level. Although the winter was unusually warm, cold snaps around December 9, January 15, January 21, and February 22 caused some stress on dormant winter grains. However, snow cover was adequate to protect the crop from significant damage. Moisture accumulations since last fall (September-February) have been normal or slightly below normal in Byelarus, Ukraine, the Black Soils Region, North Caucasus, and Volga Valley and normal to above normal in the Baltic States, Central Region, Volga Vyatsk, and the Urals.

In the West, unseasonably warm weather has diminished snow cover 3-4 weeks earlier than usual, prompting early spring fieldwork.

NORTHWEST AFRICA:

- o Morocco: Despite mild temperatures and plentiful precipitation prior to planting, winter grains are in poor condition due to a prolonged dry period that followed sowing. Area planted is estimated down slightly from last year. While significant precipitation in April may have helped stabilize the crops, prolonged dryness during the growing season adversely affected the yield potential.
- o Algeria: Winter grains in Algeria have fared better than those in Morocco, but persistent dry conditions since the early growth stages increased stress on crops. Precipitation in March relieved crop stress and even caused localized flood damage. Rainfall, which Algeria has received intermittently, is needed for the remainder of the growing season to avert widespread yield declines. Producer prices have been raised significantly in an attempt to offset the increasing cost of imported agricultural equipment and the devaluation of the dinar.
- o Tunisia: Soil moisture levels are higher in Tunisia than in Morocco and Algeria. Although precipitation in February improved growing conditions, dryness during the reproductive period in March is expected to have caused some damage. Growing conditions in the North are better than those in the South. Area planted is expected to be down slightly from last year.

ASIA:

- o India: Fall planting conditions for winter grains were much less favorable this year across the northern half of India, due to the early withdrawal of the summer monsoon (normally June-October). In addition, a drier-than-normal summer growing season in central India left a large portion of the rainfed wheat zone in poor condition. Soil moisture levels at planting time (October-November) were below optimum and resulted in an expected 3-percent decline in sown area for the 1992/93 crop. However, favorable December showers over a large part of the wheat belt were timely for early establishment and vegetative development. More than three-fourths of total wheat area is irrigated, but winter showers are important in supplementing irrigation supplies and maintenance of rainfed grains. The current winter growing season has exhibited a more favorable rainfall pattern than last year, with beneficial showers recorded across the northern Gangetic Plain. These showers have helped offset early season dryness and have set the stage for excellent potential crop yields in many areas. In comparison, rainfall in central India has been deficient. The drought that began in late summer has continued, contributing to a bleak outlook for winter grain production in the region. As of late March, the heavily irrigated northwest portion of the wheat belt is in the grainfill stage, while harvest operations are ongoing in the remainder of central and east India.
- o Pakistan: Autumn planting conditions were seasonably dry in northern Pakistan's wheat zone, due to below normal rainfall in October and November. Rainfed wheat plantings have suffered and, as a consequence, overall crop area is estimated down about 1 percent from last year.

However, widespread beneficial showers during December and January, replenished soil moisture and aided germination. Normally, less than one-fourth of Pakistan's wheat crop is rainfed. Winter grain establishment has been strong in all areas outside of the main rainfed or "barani" growing region. Fertilizer shortages, which have plagued farmers during the past two wheat seasons, reportedly have not been a hindrance this year. Reportedly, distribution and offtake have been higher than last year as have improved seed supplies. Overall growing conditions to date have been favorable. However, late plantings, due to early season dryness and cool winter temperatures, will postpone maturation of the 1992/93 crop into the hot spring months. Rainfall during March and April is essential to alleviate high soil temperatures and crop stress.

- o **Bangladesh:** Autumn planting conditions were nearly perfect this year, with excellent post-monsoon soil moisture reserves aiding early crop establishment. Winter rainfall also played a key role in maintaining crop vigor prior to reproductive growth phases. Area is expected to be essentially unchanged from last year.
- o **China:** Winter grains area is estimated down 2 percent from last year due to 2 years of lower prices and drought conditions in the North China Plain during the autumn planting season. Planted area was reported down in Henan, Shandong, Shanxi, Hunan, and Sichuan due to drought. Excessive rains in Jiangsu and Anhui delayed plantings. About one-quarter of China's seedlings were drought-stressed before winter, but were partially relieved by higher-than-normal snowfall in December 1991 and a mild winter. Favorable spring rains will be needed in the North China Plain, where winter wheat was poorly established. However, winter crop areas in the southern plains received drizzling rains in February and March and moisture conditions there are favorable. In addition, there are reports of weed problems in the area between the Yangtze and Huai rivers and a high incidence of plant diseases and insect pests in Northwest China. Input supplies are adequate and agricultural investment by local and national Governments has been good.

MIDDLE EAST:

- o **Israel:** The outlook for the current wheat crop is favorable. Abundant rainfall between October and January has created excellent growing conditions. Isolated wheat growing regions experienced flooding and hail at planting. However, damage was minimal and the crop was not seriously affected. Wheat is Israel's only rainfed crop.
- o **Jordan:** After 3 consecutive years of below average rainfall, Jordan has received abundant precipitation. Winter grain growing areas east of the Jordan River suffered minor damage from excessive rains. Reservoir levels and underground water supplies have been replenished and current crop conditions are average.

- o Saudi Arabia: In spite of continued efforts by the Government to decrease wheat plantings, wheat will continue as the country's biggest crop in terms of total area. Area is expected to remain largely unchanged from last year. Unusually low temperatures during February and early March may have seriously damaged the wheat crop in several important regions.
- o Syria: The outlook for the 1992/93 winter grains crop is favorable. Rainfall was abundant at planting allowing for much of the crop to be seeded early. Seventy percent of Syria's wheat crop and almost all of the barley are grown under rainfed conditions. Both crops are produced primarily in the northeastern and central regions where cool temperatures have slowed crop development.
- o Turkey: After 2 consecutive years of above average production, the winter grain crop is once again receiving favorable weather. Fall and winter precipitation have been timely and adequate. Wheat and barley support prices remain high, encouraging farmers to sustain area levels.

NORTH AMERICA:

- o Canada: The 1992/93 winter wheat area in Ontario is expected to reach a record level which is nearly double the 1991/92 area. The increase in plantings can be attributed to attractive income guarantees under the Gross Revenue Insurance Program, an early soybean harvest, and ample soil moisture at planting time. Temperature and rainfall have been near normal throughout the fall, winter, and early spring. Ontario produces about 75 percent of Canada's winter wheat. However, winter wheat accounts for about 5 percent of Canada's total wheat output.
- o Mexico: Winter wheat area is estimated 3 percent below last year. Heavy rains in the primary growing states of Sonora and Sinaloa, which account for over 50 percent of the winter wheat, delayed planting by several weeks and washed out fields that already had been planted. In contrast, the crop in Guanajuato is in excellent condition. Uncertainty over producer prices at planting time may have prompted some farmers to shift to corn or dry beans.

Note: The initial forecast of wheat and coarse grain area, yield, and production for the 1992/93 year will appear in the May edition of the World Agricultural Production report.

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THAILAND AND INDONESIA GRAIN SITUATION

Foreign Agricultural Service personnel traveled to Thailand's Central Plain Region and Indonesia's western Java and southern Sumatra during March. In Thailand, total rice production for 1991/92 is estimated at 13.5 million tons (milled basis), up 19 percent from last year. The main season crop is revised upward this month, to 11.9 million tons, while the second season crop is unchanged at 1.6 million. Presently, the second season rice crop is being harvested from an area about the same as last year, but yields are expected to be higher. Corn area has continued its recent decline and is estimated at 1.3 million hectares, down 2 percent from last year. Yields were also slightly off the 1990/91 pace and production is estimated at 3.6 million tons, a decline of 5 percent from last season. In Indonesia, 1992/93 main season rice is in varying stages of development. The crop condition in western Java is good, although a few areas have had excessive moisture which has hampered the harvest. If weather remains normal throughout the season, a better-than-average crop is anticipated. The corn crop, harvested earlier, is estimated at a record level. An expansion in area and use of hybrid seed increased 1991/92 corn production to 5.3 million tons, up 2 percent from the previous year.

THAILAND

The 1991/92 rice crop (milled basis) is estimated at 13.5 million tons, up 19 percent from last year's insect-damaged crop. A larger-than-anticipated main season harvest resulted in an increase in the production estimate from last month. The second season rice crop, that is currently being harvested, is in good condition and better-than-average yields are expected. The main season rice crop is estimated at 11.9 million tons, while the second season crop is placed at 1.6 million.

Favorable rainfall improved yield prospects during the last quarter of the main rice growing season. Since about two-thirds of the main season crop is not irrigated, timely rainfall is crucial for normal crop development. Dry weather was experienced throughout the harvest and a good quality crop is expected. The main season rice crop recovered from last year's insect infestations since new, brown planthopper-resistant seed, RD23, was made available by the Government. This year, Thai farmers relied upon the Bank of Agriculture and Agricultural Cooperatives (BAAC) for loans, which are 1 percent below the commercial rate of 13.5 percent. The Bank is expanding its role so that small-scale farmers can reduce their dependence on informal loans. About 60 percent of the loans from the Bank are short-term, 1-year loans used for agricultural inputs. These BAAC loans, favorable weather, and use of the Extension Agent Training and Visit System allowed farmers to capitalize on the new high-yielding varieties (HYV) to produce a potentially near record crop. Nearly 80 percent of the farmers use HYV seeds, an increase of 55 percent from 10 years ago.

The second season crop, of which nearly 70 percent is irrigated, represents about 10 percent of total rice production. Although farmers were urged to reduce rice plantings during the dry season because of low reservoir levels, it is uncertain at this time if producers actually planted less. Favorable weather, availability of inputs, and no significant reports of disease or insect problems indicate improved yield prospects for the 1991/92 crop. Increased fertilizer use and more intensive farming practices should result in yields for the second crop that are double those of the main season crop.

Corn, which is grown under rainfed conditions, is estimated at 3.6 million tons for 1991/92, down 5 percent from last year due to lower yields and a continuing decline in area. Even though corn prices are strengthening on demand from the feed industry, producers are increasing plantings of sugarcane and soybeans at the expense of corn. However, in the coming years, corn area is expected to stabilize as feed use expands. The first-season crop, grown from April to August, accounts for about 90 percent of production. The remaining 10 percent is grown from August to January. Corn yields have increased 12 percent over the past ten years as farmers doubled their consumption of fertilizer, switched to HYV seed, and mechanized their farming operations.

INDONESIA

Rice production in Indonesia for 1992/93 is expected to be above last year's drought-reduced crop of 28.7 million tons (milled basis). For 1992/93, favorable weather since January has allowed the main season crop to be planted and develop normally. Although some reservoirs are below the average level, there should be enough water available for irrigation during the dry season.

Rice in western Java was observed in varying stages of development. Some fields were noticeably too wet for optimal harvesting. However, the crop was in generally good condition. Farmers reported no insect problems and yields were much better than last year. Producers were optimistic about their first crop and millers corroborated the producer's claims of improved yields. About 60 percent of Indonesia's rice is grown on Java. However, with a rapid expansion of industry, highly-productive, irrigated cropland is being displaced. In order for Indonesia to expand rice output, yields must be improved through considerable investment in research for HYV seed and continued development of irrigation systems. Over 90 percent of the rice produced in Indonesia is irrigated. In the coastal Java lowlands, extensive canals, developed over the past 30 years, follow the road systems. Producers maximize their output by continually planting and harvesting rice in close proximity to these canals. In the higher altitudes, crops are terraced along the mountainsides and where spring water is available, farmers produce multiple crops. The average farmer owns 0.5 hectares and, with labor intensive farming, achieves yields that are the second highest in Asia after Japan.

Corn production for 1991/92 is estimated at a record 5.3 million tons, up 0.1 million from last month and 2 percent above last year. Producers are planting more HYV seed and committing more area to corn than in previous years. Nearly 20 percent of the farmers use HYV seed. In southern Sumatra's Lampung Province, which is a major corn producing area, the harvest has been completed. Dry weather during harvesting helped to quickly dry down the crop. Grain company and Government officials noted that the average on-farm moisture content was 30-40 percent. Subsequently the corn was either dried on the producers' cement patios or sold to private traders who sun-dried the corn or use mechanical dryers to reduce the moisture content to 15 percent. The corn was then sold to feedmills.

A rapidly expanding feed industry, increasing use of fertilizers, and adoption of HYV seed has resulted in continued growth of corn output. Over the last five years, area has increased annually and this trend is expected to continue in the short-term. Most of the expansion will take place in Sumatra, since it is not overly developed as in the case of Java. Private companies and estates are preparing land and infrastructure for food crop development. All the corn is rainfed and any irrigation canals developed will probably be used for rice production.

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TABLE 11

THAILAND & INDONESIA GRAIN PRODUCTION

	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
<i>Corn</i>											
AREA HARVESTED						(million hectares)					
Thailand	1.75	1.85	1.83	1.96	2.27	1.82	1.75	1.60	1.40	1.35	1.32
Indonesia	2.96	2.06	3.00	3.09	2.44	3.05	2.68	2.85	2.70	2.85	2.90
YIELD						(metric tons per hectare)					
Thailand	2.49	1.86	2.16	2.23	2.36	2.37	1.56	2.63	2.93	2.81	2.73
Indonesia	1.53	1.57	1.69	1.71	1.77	1.64	1.79	1.82	1.85	1.82	1.83
PRODUCTION						(million metric tons)					
Thailand	4.35	3.45	3.95	4.35	5.35	4.31	2.74	4.20	4.10	3.80	3.60
Indonesia	4.51	3.24	5.09	5.29	4.33	5.00	4.80	5.20	5.00	5.20	5.30
<i>Rice (Milled)</i>											
AREA HARVESTED						(million hectares)					
Thailand	9.11	8.94	9.61	9.63	9.83	9.66	9.24	9.92	9.99	8.80	10.00
Indonesia	9.38	8.99	9.16	9.76	9.90	9.90	9.80	9.80	10.53	10.50	10.14
YIELD						(metric tons per hectare)					
Thailand	1.29	1.25	1.34	1.36	1.36	1.29	1.32	1.42	1.33	1.29	1.35
Indonesia	2.38	2.54	2.62	2.66	2.68	2.68	2.76	2.81	2.76	2.80	2.83
PRODUCTION						(million metric tons)					
Thailand	11.73	11.14	12.90	13.14	13.37	12.45	12.16	14.03	13.32	11.35	13.53
Indonesia	22.29	22.84	24.01	25.93	26.54	26.50	27.00	27.50	29.07	29.37	28.68

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